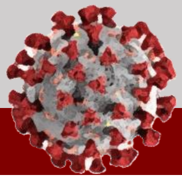


Frequently Asked Questions

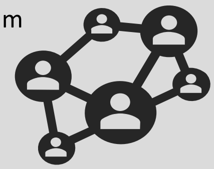
CCTO Contact Tracing Tool

Tracing and Testing Platforms:

COVID-19 Contact Tracing

CCTO Software

A web-hosted software program that the CCTO Team uses to work with people who have tested positive for COVID-19 and to help people who have been exposed to them to quarantine so that friends, neighbors, and loved ones can be protected.

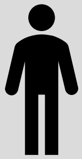


1. **Case Investigators, Contact Tracers, and Regional Managers** will utilize this system to record and monitor day-to-day information about the symptoms and contacts of people with COVID-19 and those in contact with them.
2. **Residents** will submit daily questionnaires to record their updates while under monitoring.

COVID-19 Testing

Check My Symptoms Tool

A public website (*separate from CCTO*) where residents can input symptoms to check if they match certain criteria. Eligible residents will receive a list of nearby testing sites via email or text.



1. **Staff Facilitators** will utilize an app to confirm residents' submitted information.
2. **Staff Collectors** will utilize an app to link residents to their test samples.
3. **System Staff** will use this system to import residents' test results.
4. **Residents** will use a portal to register for tests and review results.

Contents

Assessments

1. **If a contact missed an assessment from the day before, do they make up both when they are reached?**

When you reach the contact again after a period of unresponsive time, please input their retrospective answers in a ***note*** detailing this situation. As of right now, the system does not have the functionality to create assessments for the past or future as date fields are locked within the assessment itself.

2. **What should I do if someone wants a work note or email sent to their employer that they will be out of work due to quarantine/isolate?**

If the contact requests a note for their employer, advise them that you will email that to them.

3. **Are contacts required to complete all questions in the digital assessment?**

No, the digital assessment does not require a contact to complete all the available questions.

4. **If a contact does not complete an assessment, how should I mark the appointment? The only options are "completed" or "canceled."**

You can set it to "Canceled" and follow-up with a phone call. Remember that tasks and appointments are only there to help you remember to do assessments.

5. **How do I start a new assessment for a contact?**

In the Contacts Tab, select "Active Contacts", and choose "My Active Contacts." Double click on the contact to see their contact record. There should be four tabs at the top of their profile – click the "Assessments" tab. There will be a '+', then click "New Assessment."

6. **In tracking my daily texted assessment, how do I verify that a contact has responded back with a completed assessment?**

Open the contact record and click the "Assessments" tab below the contact's name. This will take you to the assessments table. Find the date of the assessment you are looking to confirm and check the "AGREEMENT" field. If the data shows "Yes, I will participate," then the contact completed the assessment. If the field is **blank**, then the contact did not complete the assessment.

Assigning Contacts

1. **Can any tracer or supervisor reassign appointments or contacts?**

   Currently, yes, any tracer or supervisor can reassign appointments and contacts.

2. **How do we know who the case investigator is for the contact? How can I see who assigned me my contact?**

   The case investigator would be a communicable disease nurse at the applicable county. In a contact's profile, you can visit the tab "System Information" under their name and look for "Details" to see who created and most recently modified a contact; the case investigator may be the person who created the contact and assigned it to you.

3. **If County A has contacts residing in County B, how should the process of reassigning be handled?**

   Please see the Out of Jurisdiction Contacts Job Aid here for more information.

4. **Will I be assigned a list of contacts?**

   For LHD staff, whoever talked to the case patient may enter contacts and assign them to themselves or to others. For CCNC staff, contacts will be assigned by your local health department or you may be asked to enter contacts and assign them to yourself.

5. **Do you have to assign yourself to contacts you input?**

   No, once you input a contact, the contact is automatically assigned to you.

6. **How can I see my assigned contacts?**

   You can see all contacts that you are assigned to or that you have created and remain assigned to you in the "My Active Contacts" view.

7. **Do I need to re-assign a contact if I am not working a certain day, but they still need to be monitored? What is the process for reassigning contacts if I have time off?**

   Use the assign function to assign contacts or tasks/appointments to another worker. Please see here for the job aid describing this process.

8. **How do I change the "Assign" button from "Me" to "User or Team?"**

   To change the automatic assigning, please utilize the job aid. It can be found on the top of the second page.

9. **If we assign a task to another tracer, will this contact tracer receive an email to be notified they have new tasks?**

The contact tracer will not get an email. Assigned tasks and appointments will appear in "Activities," and assigned contacts will appear in "My Active Contacts."

10. **How much time should elapse between a contact being assigned in CCTO and being called?**

As a best practice, contacts should be called as soon as possible after they have been entered into the system to ensure that they have been advised on quarantine. Defer to your local guidance on follow-up.

CCTO Interface

11. **What are the links to the test and prod systems?**

- Test: https://dhhs-covid19-arias-uat.crm9.dynamics.com/apps/arias

Do not put real people in the test system

- Prod: https://dhhs-covid19-arias-prod.crm9.dynamics.com/apps/arias

12. **Is "Sandbox" the live version of CCTO, or is it just for training?**

The Live (aka Production) environment does not have anything in the dark blue banner at the top of the application tool. The Sandbox (aka UAT) environment displays the word SANDBOX in the dark blue banner at the top of the application tool and represents the test environment and should only be used for training. Please review the guidance described at the beginning of the August 18, 2020 training for support.

13. **Is this interface being used for only COVID-19 contacts?**

Currently, this system is only to be used for tracing COVID-19 contacts.

14. **When will the soft phone function be released for county use? Am I able to make calls or send texts within CCTO?**

The details of this functionality are still being worked through. Communication will be sent out when and if the functionality becomes available. To communicate with a contact via phone, you will have to dial their phone number from a phone line.

15. **Is there a way to send messages to other contact tracers within the system?**

Currently, no; communication with tracers must be done outside the system.

16. **Is this system required for all counties to use?**

    Please refer to the NC DHHS Contact Tracing Guidance (in the CD manual, here) which directs LHD staff to enter contact information in the CCTO tool.

17. **Is this platform secure and HIPAA compliant?**

    The CCTO system, similar to the NC EDSS system, is used for public health surveillance and is compliant with N.C.G.S. §130A-143 confidentiality requirements. It is NIST 800-53 R4 compliant per the North Carolina Department of Information Technology Statewide Information Security Manual. The Statewide Information Security Manual is the foundation for information technology security in North Carolina. It sets out the statewide information security standards required by N.C.G.S. §143B-1376, which directs the State Chief Information Officer (State CIO) to establish a statewide set of standards for information technology security to maximize the functionality, security, and interoperability of the State's distributed information technology assets. The portion of the NC DHHS, Division of Public Health, Epidemiology Section, Communicable Disease Branch that receives this information and controls CCTO is not covered by HIPAA, under NC DHHS's HIPAA Hybrid Entity designation. Therefore, HIPAA does not apply.

18. **How can I log into the tool and who should I contact if it is not working?**

    Your login should be your NCID credentials. Please review the troubleshooting described at the beginning of the August 18, 2020 training for support. For all access related issues to the system beyond what is described here, please contact your local NCID admin. They will then route you to the appropriate party if escalation is required. Your NCID admin can be identified through this link: https://www2.ncid.its.state.nc.us/NCID_County_gov_map.asp.

19. **How can I change my time zone?**

    Currently, the time zone must be changed manually by each individual tracer in their settings. Guidance on this process can be found in the "CCTO Onboarding Reference" job aid here.

20. **Is there a way to identify duplicate entries into the CCTO system?**

    Duplication is automatically detected in the system when you enter the name and date of birth of the contact. If you wish to search for duplicates, you can sort and filter by first name, last name, or any other field in the contacts page.

21. **Does the CCTO Tool run on mobile or tablet?**

The CCTO Tool should be functional on any device that supports a web browser.

22. **How will I run a report showing current users in CCTO?**

Filter the column called "Owner" on "Contains Data" and use the Export to Excel button at the top center. The file, for most users, will go to their Downloads folder.

23. **What actions can a CCTO administrator perform that a regular user cannot? How can I check if I am an admin in CCTO?**

The primary role of the LHD CCTO administrator is to allow the individual to upload contacts in bulk format to the CCTO application tool. Please check with your local NCID administrator to see if you have admin privileges.

24. **Is it possible to export Excel reports for tracking purposes?**

Yes, this functionality exists in the CCTO application tool. However, you must be a CCTO Administrator to use this function. Based on your Employment, Local Health Department (LHD) or CCTC, you have a CCTO Administrator. Reach out to your regional supervisor or LHD to identify your CCTO Administrator or team members who have these permissions.

25. **Is there a way to see all the contacts in my county only?**

You can filter any contacts view by LHD to see LHD contacts if a county view has not been shared with you. Please see here for the "Quick Reference for Supervisors" job aide describing the aforementioned process.

26. **How can I remove a view from my dropdown list?**

Return to the Create View screen and select "Saved Views" at the top left. You can then select a view an deactivate it (hide it from the drop down) or delete it permanently by clicking the buttons at the top above the word "Records."

27. **Is it possible to search for contacts by the NCEDDS #?**

Yes, this is a searchable field in the search bar at the top right of the contacts tab.

Households

28. **How should info be entered for a Household if the last name is already in use for another Household?**

You will be notified of a duplicate entry, and there is a chance that duplicate households will exist. To avoid this, you can include the main family member's name instead in addition to the household name and can use parenthesis. For example, "(John) Smith Household" to differentiate across Smith Households in the tool.

29. **How do we handle Households that include contacts with different last names?**

This can be handled a few ways. You can enter multiple last names with slashes between (for example: "Smith / Plant Household") or you can choose the main Household Contact's name (for example: "John Smith Household"

30. **Can tracers who don't enter contacts create a Household?**

Yes. Ideally, tracers who enter contacts should be the ones responsible for creating Households, but you can create a Household even if you do not normally enter Contacts.

31. **How do you deactivate a household and family members within a household? Do I need to deactivate a household if all members have already been deactivated?**

These deactivate separately:

- Step 1: Deactivate each contact within the household one at a time (like you normally would)
- Step 2: Once all household members are deactivated, you should manually deactivate the Household record. Currently, this is not required, as there is no state-level protocol around this, but you are encouraged to do so. Please remember that deactivating contacts in the household should be a priority.

32. **When dealing with a family of contacts, can one person complete the assessments for everyone in the home? Can just one assessment be completed?**

Individual contacts must always have individual assessments, so you cannot complete one assessment for a whole household. Assessments may be completed by proxy for household members; however, assessments should always be logged in the individual contact profile of the contact to whom they pertain. For example, a mother responding on behalf of a child is perfectly acceptable; however, the child’s assessment should be logged in the child’s profile, not the mother's (if one exists). You can indicate the household member to whom you are speaking in the "Primary Contact" field on a household profile.

33. **What happens if someone in a Contact's household tests positive and does not exist in CCTO?**

This could be because positive cases live in another state system, called NC COVID (COVID instance of NC EDSS). If this happens, talk to your regional supervisor to escalate and determine what additional steps are needed. It will likely be necessary to follow up, as this will affect a Contact's most recent exposure date and quarantine period (if they are living with/ in the same household as a positive case).

34. **How can you prevent adding duplicate households?**

If you enter a duplicate household name, you will receive a warning that the Household name is a duplicate (similar to the duplicates warning you get when adding a duplicate Contact name). It's a best practice to review these suggested duplicates and confirm that you are entering a new household.

35. **What should I do if there is a grandparent in a Household?**

Within Household relationships, tag the grandparent as "Other Adult." Also, you can use the "Notes" functionality to make note of grandparents in a household.

36. **Should you retroactively create households for previous contacts?**

This is not required, but if it is easier to create a household with Contacts in the system during their monitoring period, feel free to do so.

37. **How do I reassign a household? Should I reassign all the contacts, too?**

From your household profile, reassign the household umbrella. All the contacts should be reassigned with the household automatically.

38. **Why does the system think my new contact/household member is a duplicate? What should I do?**

The duplicate detection in CCTO is currently very sensitive to similar names, birth dates, and phone numbers/emails. You are welcome to ignore these warnings when adding household members. In the future, we hope to improve this functionality.

39. **What if my household members have different contact information/source patient information?**

Household members are not required to have the same contact information, and you can edit the information of any member during or after the contact creation process without impacting the household profile.

40. **How do I enter a note in Household and have it show on all members of the household?**

This is not currently a function available in the CCTO tool.

Closing a Case

41. **How do I know which Final Monitoring Outcome to select?**

Please review the detailed guidance and review questions provided in the September 1st live training and materials.

42. **How do we remove a contact from the active listing?**

To remove a contact from the active listing, click on the contact or the ✓ on the left hand of the "My Active Contacts" screen. Then click 'Deactivate' in the tool bar located at the top. Then click 'Deactivate.' To see if your contact has been deactivated, drop down to "Inactive Contacts," or search for the first or last name of your contact.

43. **Is there a way to close out all the associated appointment reminders when closing out a contact or do these each need to be closed out manually?**

Each appointment reminder will have to be closed out manually. This can be done either by going into the contacts page or going in to the "My Activities" view, filtering on the contact, and using the checkmarks to remove the appointment reminder.

44. **Is a contact automatically notified when their case is closed? Do I need to trigger something?**

You can stop daily emails by setting "Begin Monitoring" to "No" and "Monitoring" to "Monitoring Ended". However, a contact is not automatically notified when you end monitoring. If you wish to inform your contact that their case is being closed, you will need to initiate outreach.

45. **If a Contact opts out of monitoring, do we deactivate?**

Yes. You need to make sure to follow all steps to close out a contact (See Closing out a Contact Job Aid in the CDM). Please use the following steps:

- Step 1: Change “Begin Monitoring” to “No”
- Step 2: Change “Monitoring Status” to “Opted Out – All Monitoring”
- Step 3: Enter "Final Monitoring Outcome" value as "Refused"

Note: If you are part of CCTC Staff, you need to check with your regional supervisor to ensure you are compliant with protocol specific to your Health Department.

46. **When should I select “State OOJ – Notification Completed?**

“State OOJ” refers to a contact who is outside of the state of North Carolina. You should not need to touch this button. If you encounter this situation, review the State OOJ process listed here for handling out-of-state contacts.

47. **What if you receive a contact at the end of the monitoring period and their initial assessment is their final?**

A contact whose initial assessment is also their final is “Partially Complete.” A “Fully Complete” individual has had time to take quarantine action on their exposure, and so at least two assessments must be logged.

48. **What if you receive a contact after their monitoring period is over?**

If an assigned contact’s monitoring period has already ended, you may treat this contact as “Never Reached” for State purposes; however, you should defer to your local guidance on how specifically you should close this case and whom you may need to notify.

49. **Can you get a final assessment done 3-4 days after their monitoring period is over?**

To be considered “Fully Complete,” a final assessment must be on the final day of quarantine or within the two days **following** this date. This allows us to know that the individual has not developed any symptoms throughout the 14 days following exposure. If a contact’s last assessment is before the final day of quarantine, they are considered “Partially Complete.”

50. **What if you reach them initially but call drops after they were told of exposure, but before they explicitly rejected or accepted monitoring. what if they can't be reached again? is that refused or never reached?**

If a contact is informed of exposure, they should be marked “Refused” rather than “Never Reached.”

51. **Is it necessary to make a final call after the last day of quarantine/monitoring specially when the contact chose digital monitoring?**

The State recommends you call to close out all contacts (even those who opt for digital monitoring) as a best practice; however, defer to your local guidance on call frequency.

Digital Outreach

52. **If you were to reach the contact by phone and they want to do the initial assessment via phone would you edit the one that was already sent, or would you add a new initial assessment?**

Currently, you can fill in the initial assessment. Defer to your local guidance if needed.

53. **How do I send an email from the tool?**

You would need to click on the email icon next to the field where you are able to input the contacts email address. Once the icon is clicked, a blank email with a prepopulated link will pop up on your screen. This prompt will utilize your native email. We ask that you clear the link before sending the email to the contact.

54. **What should we do if a contact refuses to answer our questions?**

As a contact tracer, you would need to reach out to your supervisor for their protocol in this situation

55. **Is there a way that we can verify that the contact receives the text or call (for daily follow up)?**

Yes. Copies of automatic outreach sent will appear in "Timeline/Activities" for your reference.

56. **Is there a way to incorporate in guidance for the auto generated response for the contact to be able to verify the message is not spam?**

Not yet. We plan in future to add a verification phone number to the email.

57. **If a contact does not initially fill out the assessment digitally, can they respond digitally later?**

Contacts have access to submit digital assessments if they have provided an email or mobile phone number and you have set "Begin Monitoring?" to "Yes" and updated "Preferred Method of Contact." Clicking the link they receive will allow the contact to submit an assessment at any time. The system will send a new email/text every day unless you set "Begin Monitoring" to "No".

58. **If a contact agrees to digital assessment and monitoring, do I need to send this every day? Is digital outreach automated?**

Text and email reminders to your contact are automatic if you have input a date of birth, selected "Begin Monitoring?" to "Yes," provided an email or mobile phone, and indicated "Preferred Method of Contact."

59. **How do I turn off daily emails to a contact?**

Turn off digital outreach by setting "Begin Monitoring?" to "No."

60. **Can I reach out digitally if a contact has missed their digital assessment?**

You may reach out to a contact by text or email according to their preference if a contact has missed digital assessment. Best practice is that you speak to every contact on the phone at least one time.

61. **When should I call if I see a contact has missed their digital assessment?**

Call your contact as a best practice when you begin initial monitoring. Otherwise, local protocol can drive when you next reach out. Best practice is that all contacts send information or is contacted daily.

62. **Do I need to call contacts who have indicated a digital contact preference?**

You do not need to call contacts who have indicated they only wish to be reached digitally if they respond to the digital reach out; however, it is a best practice to attempt to establish an initial phone contact with each contact.

63. **Is there is a way to keep track of all messages going out?**

Make sure to indicate your outreach in Timeline/Activities if you are messaging via phone, text, email, etc. For automatic outreach, a copy will appear in Timeline/Activities for your reference automatically.

64. **Is there reporting that can be run (daily or a few times a week) as a safety net to make sure no contacts or follow ups were missed? Is there a way for us to do this for county specific contacts?**

Sorting by "Last Assessment Date" will let you see who needs to be contacted, and you can add a filter for "Local Health Department" as well. Please see guidance on this process in the "Quick Reference for Supervisors" job aid here. There are some situations where the last assessment date is empty even though a recent assessment has been created. Therefore, to use the process, you would need to fill the prior agreement fields.

65. **Is the SMS functionality only compatible with government phones?**

No, this function is available for all phones.

66. **What is the process to send educational information to contacts if their email/number has been collected?**

For digital information to be sent out to the contact, their email must be inputted in the system. The tracer should confirm with the contact their comfort with being sent educational COVID-19 related material/guidance. You can then click the email option within the contact page to send an email – note that this email will be sent via whichever email the tracer uses to log in to the system. No secure or sensitive information should be sent via email.

67. **How long are follow-up attempts made to non-compliant contacts who are not replying to daily monitoring requests via email, text or phone before the case is closed? Is the case closed once quarantine ends?**

Please follow your county's guidance on when to close the case.

68. **Can you customize the message by County to send out to each LHD?**

As of right now, there is no known functionality to send specific messages by counties or LHD.

69. **Does a contact have to have a NC EDSS/NC COVID number to trigger the digital outreach?**

NC EDSS/COVID Event ID is not required for the digital outreach to occur.

70. **I have several contacts who are minors and have the same parents. The parents would like to fill out surveys for them using the same email. Can you verify if they are able to fill out multiple surveys using the same email, but verifying different birthdays?**

Each family member should receive an email, the parents can complete the assessments for each child based on the child's DOB. Please review the assessment tab to ensure that all assessments have been completed and loaded successfully in CCTO.

71. **What is the difference between "Opted out – Digital Monitoring" and "Opted Out – All Monitoring"?**

"Opted Out – Digital Monitoring" is not an option you should ever turn on. The system will turn this on to alert you that an individual has opted out of text or email outreach. When you see it, you should return it to "Monitoring," reset preferred method of contact to "Phone Call," and call your contact to confirm how they wish to proceed. If a contact opts out completely, you may then change

"Monitoring Status" to "Opted Out – All Monitoring," "Final Monitoring Outcome" to "Refused," and close/deactivate the contact per your local protocol.

Field Visit Outreach

72. **How will the resources notification work if a contact is deemed to need additional resources (thermometer, food, medication, etc.)? How is the local health department notified?**

When a contact enters into the system or notifies the tracer that they require additional resources, it is the tracer's responsibility to then relay that need/request to the local health department. If the tracer is filling out the assessment for the contact, the tracer should input these needs in the notes section of the form and reach out to the local health departments to notify them of the need.

73. **What if the contact does not have any contact information listed?**

As a first step, you would need to reach out to the case investigator to inquire if they have any further information on contact information for the contact.

Inputting Contacts

74. **How do we address minors and receiving their information?**

If the contact is under 18 years of age, the contact tracer will need to speak to the legal guardian. The contact tracer must ask the legal guardian if they can speak to the minor directly or if they would prefer to stay on the line. Minors can reply digitally once a parent has given permission. Permission should be noted in the minor contact record with the date it was given, and the "Is Minor" toggle should be selected.

75. **Do you need to get a minor's permission for a parent to speak on their behalf?**

If the minor is <13, no, but if the minor is from the age of 13-18, yes. As a best practice, it is preferred that you speak to a parent on a minor's behalf if they are under age 13.

76. **We have partners at our hospitals and city/county who are doing contact tracing for those employees through their employee health. Do these contacts have to be put in the system?**

Yes, these contacts should still be input into the system and have 14 days of follow-up documented. This is the only way to generate local and statewide reporting on how many contacts are notified per case.

77. **Is there a standardization for inputs such as phone number or notes?**

Please defer to your local guidance on standardizing items in Timeline/Activities pending updated functionality.

78. **Does telephone contact need to be initiated with the contact prior to entering CCTO? Is the DOB necessary for even the phone outreach options?**

Telephone contact is not needed prior to the contact being inputted into the tool. The DOB is not necessary for phone outreach. The contact tracer can reach out via phone to the contact and input assessment information that way as well.

79. **How would we upload contacts that we are already monitoring as a batch?**

Email the help desk with this list and they will be able to help upload that list through contact with a data manager.

80. **What is the process for if a contact opts out and then becomes a contact for another person? Will we be able to see that they have already opted out?**

If a contact tracer tries to enter the contact who opted out in to the CCTO tool again, a duplicate warning message would pop up. If they went into the original record, you will be able to see that they have opted out. You are also able to search the name of the contact who has opted out in the system to gather this information.

81. **Will all critical information, such as NC EDSS and Last Date of Exposure, information be provided to me? If not, how do I find it?**

All critical information should be provided to you by the Case Investigator. If not, review the “System Information” tab on a contact’s profile and visit “Details” to see who created the contact and follow-up.

82. **Is there a way to document that someone has died?**

Please include this as a note in “Timeline/Activities” and stay tuned for forthcoming functionality.

83. **Is the age being auto filled or does that still require manual calculation?**

“Calculated Age” will automatically populate based on date of birth, and you are able to use “Manual Age” if the contact does not provide you a full date of birth.

84. **Can the case be entered initially without DOB? Can this contact be entered without DOB for follow up by the tracer?**

Yes, contacts can be entered without a DOB. You cannot send the text or email without a DOB. The only strictly required variables are first and last name and you can use "Unk" or "Unknown" if a first or last name is not known.

85. **Are all fields required? Will the system alert me if I miss a critical field?**

The fields required for our purposes are First and Last Name, Date of Birth, Last Date of Exposure, and Source Patient NCEDSS ID. The system will only alert you if you miss first and last name, so take special care to ensure all these fields are populated correctly and fully. For any unknown fields, please input the proxy "UNK" and update the information as it becomes available.

86. **Is there a way to retrieve an accidentally deleted contact in ARIAS?**

Currently, there is not a way to recover a deleted contact.

87. **If a positive case has a contact that has been tested but no results back yet, does that contact need to go into the CCTO tool?**

Yes, and this information can be included in "Testing Details."

88. **If a positive case has a contact that is symptomatic and is scheduled for testing or even opts out of testing, do we need to put that symptomatic person in CCTO?**

Please continue to monitor the contact until the results come back. If the results come back positive, then close out the contacts case, if not positive, continue to monitor throughout the duration of the monitoring timeframe. If the contact opts out, then enter the contact and indicate that the contact has opted out.

89. **If a contact tracer in County A is notified about a close contact in County B, Does the contact tracer cross county lines?**

The contact should be transferred to the county where the contact resides. It was noted that we do not enter close contacts of contacts, only cases.

90. **Is there a template for uploading close contacts?**

Provide Job Aid:
https://epi.ncpublichealth.com/cd/lhds/manuals/cd/coronavirus/CCTO_Uploading%20Multiple%20Contacts%20Using%20Excel%20(2).pdf?ver=1.0

Language Support

91. **How should I note a contact's preferred language?**

    "Preferred Language" can be toggled to "English," "Spanish," or "Other." If you select "Other," please input the name of the language in "Other Language."

92. **Can I send a digital assessment in another language?**

    If preferred language is set to Spanish, digital outreach and assessments will be sent in Spanish. Contacts can also make this change themselves from within the assessment. Currently, English and Spanish are the only languages supported.

93. **How can I get an interpreter if needed?**

    It is important to communicate this need to your local health department as each one has a different solution and procedure.

94. **How should I note if a contact has used someone as a translator?**

    This can be indicated through the notes section.

Monitoring Contacts

95. **Who should be monitored or traced?**

    This specific contact tracing program is to be used for individuals who have been in contact with someone that has tested positive within the last 14 days (i.e. being within 6 feet of some for a prolonged period of 15 minutes or more).

96. **How is the monitoring process triggered and how can I know to follow up?**

    To trigger the digital monitoring process, you will first need to ensure that all contact information, including "Preferred Method of Contact," and "Date of Birth" have been properly populated. Then, select "Yes" in "Begin Monitoring?" (if directed by local protocol) and "Monitoring" in "Monitoring Status." To schedule tasks and appointments for follow-up, use the Timeline/Activities section and select "+" → "Task" or "Appointment."

97. **We anticipate questions from contacts and would prefer those to come back to the LHD, but the information auto generated on the daily correspondence gives the CCNC call center number. We will just need to know how we will receive these questions, particularly for contact tracers who are not working full time.**

The contact tracer should call the Contact Tracing Call Center **(844 628 7223).** The call center staff will receive the call and navigate through the CCTO tool to search for the contact. The call center staff should either document the resolution in the ***notes*** in the ***Timeline/Activities*** section or create a ***Task*** for the Contact Tracer to review the phone log if it is not resolvable. Contact Tracer assigned to the Contact will review the ***Task*** assigned to them and perform outreach (if needed). Contact tracer will then close the Task.

98. **Why are "Begin Monitoring Date" locked and the "Last Assessment Date" locked?**

The system automatically populates these dates based on when you begin monitoring.

99. **How can we keep specific workplaces on our radar as well as identify if that high-risk exposure site has had any type of increase in positive activity?**

Please stay tuned for forthcoming functionality on high-risk exposure sites and adhere to your local guidance on including as much information as possible in "Employer," "Job Title," "Is Student, and "School fields.

100. **How do I know the beginning and end of the monitoring period?**

The end of the monitoring period will always be two weeks (14 days) from the last date of exposure, which is not necessarily a full 14 days from the day you begin monitoring, and this is okay. You can input and update this date in "Monitoring End Date."

101. **What does the "Monitoring Age" column mean?**

The "Monitoring Age" column shows how many days you have been monitoring a patient, or how many days have passed since an initial outreach occurred. For example, a "Monitoring Age" of 5 means that you have been monitoring this contact for 5 days. This is a locked field and is automatically calculated for each day that has passed.

102. **When should I turn on "Begin Monitoring"?**

"Begin Monitoring?" will begin automatic assessment creation and potentially digital outreach within the system. Always defer to your local guidance on when to use this button. You may or may not be directed to turn it on when conducting initial phone outreach.

103. **Are we able to create an LHD specific Team(s) so that the contact could be assigned to a team instead of a specific person, especially given that many contact tracers will only work certain days during the week?**

LHD-specific Teams have been instituted in the system, and you can view the contacts assigned to this "Team" by selecting the view for your team's contacts in the Contacts Tab. Defer to your local protocol on using this Team assignment feature. Stay tuned for forthcoming functionality on custom teams.

104. **Can contacts refuse to participate?**

Contacts should be encouraged to continue but may choose to opt out. You may reflect an opt-out by selecting "Begin Monitoring?" to "No" and "Monitoring Status" to "Opted Out."

105. **What should be input for the monitoring period if the date of last exposure is ongoing (i.e. a spouse)?**

Initially, the tracer can input monitoring period for 14 days after the present date. Once there is clarity around the spouse's end of isolation date, the contacts monitoring period should be updated to reflect ending 14 days after that isolation end date. Be sure to select the "Ongoing Exposure" toggle until the exposure has concluded.

106. **What should we do when we find a contact has tested positive? Will this remove them from my contacts list?**

Please review the full procedure for handling contacts who become case patients in the job aid here.

107. **How do I identify my contacts that need monitoring?**

From the Contacts Tab, visit the Monitoring Status column and click the drop-down arrow. Sort A-Z. For contacts that have not begun monitoring, three dashes will be displayed in the Monitoring Status field indicating that monitoring has not started for these contacts.

108. **Do Contacts have to test positive for us to mark them as "Contacts that became Case Patients" or can we use the toggle if there is symptom development?**

You should only use this toggle if the Case has a positive test result. Please continue to monitor symptoms, but this field is for positive test results.

109. **Is there a timeframe for Leads to complete a task for a Contact that became a Case?**

There is not a set timeframe, but we are asking that within 14 days after they are entered that it is finished unless they have continued to be exposed and are continuing quarantine. We are working on a public dashboard for Contact Tracing and want to include final monitoring outcome, and we will look more into cases that are more than 14 days old.

110. **How do you find a contact in the CCTO when all you have is the C# and not the name?**

This is a searchable field at the top right corner of the Contacts Tab.

111. **In the training video, contact tracers enter, monitor, and close/deactivate contacts. What if this is not the guidance from my county?**

The training video shows you the end-to-end process, and you may not be the individual taking each of these steps for your county or organization. This is fine! You should always defer to your local guidance on who should handle these processes.

112. **If someone identifies a chronic condition, do I need to call them daily?**

If someone identifies a chronic condition, make sure you record it as a note in their Timeline/Activities section. A chronic condition does not change the schedule of active monitoring: if they are not participating in digital monitoring, you would need to call them daily for their quarantine period, whether they have identified a chronic condition.

113. **Will we be able to use Teams to create pools of contacts for our LHD?**

Yes, your LHD or organization may use Teams to create a "queue" of contacts needing attention; however, you should defer to your supervisor and your local guidance to see if your Team is being used in this way.

NCIDs

114. **I set up my NCID with the wrong county, how can I change this? How do I get my NCID?**

Contact your county NCID administrator.

Non-Responsive Contacts

115. **When is a contact considered non-responsive?**

Please defer to your local protocol on when a contact can be considered unreachable.

116. **What should I do after closing the case of a non-responsive contact?**

If a contact is deemed non-responsive per the guidance provided by your local health department, you should ensure "Begin Monitoring?" is "No," "Monitoring Status" is "Monitoring Ended," and "Final Monitoring Outcome" is either "Never Reached" or "Partially Complete" depending on if the contact was reachable at one point. You can then deactivate this contact.

Phone Outreach

117. **When do I begin phone outreach? How often should I reach out?**

It is a best practice to begin phone outreach when you begin monitoring, even if you are also initiating digital outreach. Defer to your local protocol on outreach frequency.

118. **Does the system calculate the length of my call? Is there a limit to how long my call can be?**

The system does not calculate the length of your call, and there is no limit to how long a call can be You can fill the "Duration" field of the Phone call note, but it is not required by NC DHHS.

119. **Is there a link between the soft call log and this platform?**

There is no link between the Phone Outreach logging procedure in this platform and any other platform.

120. **What if my contact doesn't have a telephone?**

Conduct other methods of outreach to the best of your ability with the information that you have.

121. **What if I receive an incoming call instead of making an outgoing call?**

In the "Quick Create" screen when adding a phone call, you may always select "Incoming" instead of "Outgoing" to properly log a call.

122. **Do I have to document all my phone calls?**

Yes. It is critical that you document every call that you make individually to help us understand how contact tracing effort is being spent and what are the most effective practices.

123. **How should I reflect a voicemail?**

Voicemails can be noted in the description of your Phone Call in Timeline/Activities, and the call can also be closed as "Unanswered."

124. **If someone hangs up on me, should I close their case?**

As best practice, we advise tracers to attempt outreach to the contact for three days before marking them as opting out and closing their case. Please defer to your local protocol on when a contact can be considered non-responsive.

125. **If a contact chooses not to use text or email for daily contact, does the health department staff or CCNC surge staff make daily calls?**

If the contact chooses to participate but not electronically, then the assigned Contact Tracer should be calling the contact daily to capture the assessment information until the end of the monitoring period.

126. **What should I do if I am having issues with my SwitchVox phone?**

Please use the following link for support of the softphone: https://support.carolinactc.org and click the Support link at the top of the page.

127. **Do I have to close all my phone calls?**

Yes. When you have completed or attempted a phone call, please ensure to close it by selecting the check mark, toggling "Completed" or "Cancelled," and selecting "Answered or "Unanswered."

Reference Materials

128. **Where and when can I access support materials?**

Training materials can always be referenced by using this link.

Job aids can always be referenced by using this link.

Out of Jurisdiction (OOJ) materials can be referenced by using this link.

North Carolina Communicable Disease Manual can be referenced using this link.

129. **Can I attend another training session? Where can I watch a live training if I missed it?**

Training materials on the AHEC Portal can be watched an unlimited amount of times. Please check your email for ongoing periodic live trainings. These training materials and recordings are also posted to the AHEC Webinars page.

130. **What if I am told something different than what is shown in training by my supervisor?**

The steps shown in our training provide a full end-to-end process of what needs to occur from the state's perspective, i.e., you are shown all the steps that must take place. If your local guidance is that some of these steps must be completed by your supervisor, always defer to your local guidance. It is not necessary that you are the individual who completes every step shown if this goes against your local guidance.

131. **Who should I reach out to if I am having trouble entering the AHEC website for training?**

Please submit these issues along with screenshots of the error message, if applicable, to the helpdesk < covid19ctsoftwarequestion@dhhs.nc.gov >. The link the AHEC website for CCTO training is here.

132. **Is there a training for assessments?**

Yes, updated training information has been sent out. The assessment information can be found on pages 34 and 35 in your training found here. Please refer to the Communicable Disease Manual for contact tracing process reference materials.

133. **Where can I find the educational information to email out to my contacts?**

Follow local protocols. Also provide link to DHHS COVID-19 materials for the public and the handout for contacts on the AHEC website.

134. **How do I access the Sandbox mode shown in training?**

The Sandbox link is https://dhhs-covid19-arias-uat.crm9.dynamics.com/apps/arias. The Sandbox and Production environments use the same credentials.

Referring to Testing

135. **If someone requests testing, regardless of symptoms, can I recommend them in the system? How do I handle referring someone to a test?**

You can capture that you referred someone to testing in CCTO (and you should refer anyone who is a contact for testing if they have not already been tested, regardless of symptoms). But, the CCTO system does not have functionality to electronically link someone to testing. Contact tracers should be aware of places where people can get tested locally, or contacts can be directed to use Find My Testing.

Timeline/Activities

136. **How should I document email outreach?**

You may document email outreach in the Timeline/Activities section by creating a Task. For automatic assessment reminder emails, this is tracked automatically.

137. **What is the difference between appointments and tasks?**

Appointments can be created as recurring events, while tasks are one-off items that can support a due date. Appointments are also **only** reminders, while tasks can be used to document actions such as emails or phone visits. *Do not use appointments to document phone calls, tasks, emails, or any other outreach activities*.

138. **How do I see all the calls, appointments, and tasks I have made or scheduled in CCTO?**

The Activities Tab on the left-hand side of the screen will allow you to view all the items you have entered in Timeline/Activities. Use the provided dropdowns and views to filter the information in a way that is helpful to you.

139. **How should I handle assigning monitoring if I will be out?**

You may assign a contact, a future task, an appointment, or a phone call to another user at any time. You do not need to re-assign a contact unless it is necessary to transfer all a person's monitoring to someone else.

140. **May I schedule for any time?**

You may schedule a task, appointment, or phone call for any time that makes sense for you and your contact.

141. **What are tasks used for?**

Tasks can be used as reminders to yourselves or be assigned to other tracers to alert them to an action they need to take. Unlike appointments, *which should only be used as reminders*, tasks can also be used to document outreach or actions taken, such as field visits.

142. **What do I do if recurring appointments won't save**?

Click "Recurring" at the top and complete the necessary items on this page (this is where you put in the start date, end date, and time of the recurring appointments) and then click "Set" (at the bottom of the page). It will then take you back to the initial appointment page and at the top click "Save and Close." Then go back to the contact page, look in the activities column and all the recurring appointments will be there.

143. **When recording an item in Timeline/Activities, how much information and description is necessary? Do all final monitoring outcomes warrant notes on the timeline?**

Always defer to your supervisor's guidance and err on the side of providing more information rather than less whenever possible. Consider adding notes for information or logging recaps within tasks or phone calls if it documents additional outreach you conducted or anything you confirmed by talking to the contact.

Contact Tracing Best Practices

144. **If a phone number is listed as potential spam, is there a way to make it display as "Department of Public Health?"**

We are testing a software-based phone system that will have a uniform ID across the board; we are working on a solution for this.

145. **If someone is tested more than once, where is the info entered?**

Currently, our recommendation is to enter multiple tests as a "Task," but please defer to your local guidance.

146. **If I don't have an address for a Contact, should I use the Case Patient's County?**

If you don't have an address, you should use the Case Patient's County. As an update, County is becoming a required field in the CCTO Tool.

147. **For Counties that only require weekly assessments, how can I ensure a Contact is only reached weekly to fill out the assessment?**

Currently, this assessment is sent daily while a Contact is being Monitored. If the Contact prefers text, you can tell the Contact to either fill them out daily or ignore the text outreach.